



Filing ID #10020125

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Lawrence V. Arata
Status: Congressional Candidate
State/District: PA05

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2018
Filing Date: 04/8/2018
Period Covered: 01/01/2017– 03/31/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Citizens Bank, NA	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Franklin Mint Federal Credit Union	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Main Line Health Pension Plan	SP	Undetermined	None		
Main Line Health Retirement Savings Plan ⇒ Vanguard Total Bond Market II Index Fund, 100% Interest	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: 403(b) 25.7% allocation					
Main Line Health Retirement Savings Plan ⇒ Vanguard Total International Bond Index Fund, 100% Interest	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: 403(b) 11% allocation					
Main Line Health Retirement Savings Plan ⇒ Vanguard Total International Stock Index Fund Investor Shares, 100% Interest	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: 403(b) 25.1% allocation					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Main Line Health Retirement Savings Plan ⇒ Vanguard Total Stock Market Index Fund Institutional Shares, 100% Interest DESCRIPTION: 403(b) 38.2% allocation	SP	\$15,001 - \$50,000	Tax-Deferred		
Public School Employee Retirement Plan		Undetermined	None		
School District of Philadelphia Equivest ⇒ AXA Int Core Managed Vol, 100% Interest DESCRIPTION: 403(b) 6.52% allocation		\$1,001 - \$15,000	Tax-Deferred		
School District of Philadelphia Equivest ⇒ AXA/AB Small Cap Growth, 100% Interest DESCRIPTION: 403(b) 23.16% allocation		\$1,001 - \$15,000	Tax-Deferred		
School District of Philadelphia Equivest ⇒ EQ/Equity 500 Index, 100% Interest DESCRIPTION: 403(b) 58.28% allocation		\$1,001 - \$15,000	Tax-Deferred		
School District of Philadelphia Equivest ⇒ Guaranteed Interest Account, 100% Interest DESCRIPTION: 403(b) 12.04% allocation		\$1,001 - \$15,000	Tax-Deferred		
School District of Philadelphia Optifund Investment Program 403B ⇒ AB High Income, 100% Interest DESCRIPTION: 403(b) 9.52% allocation		\$1,001 - \$15,000	Tax-Deferred		
School District of Philadelphia Optifund Investment Program 403B ⇒ Vanguard 500 Index Admiral Fund, 100% Interest DESCRIPTION: 403(b) 50.34% allocation		\$1,001 - \$15,000	Tax-Deferred		
School District of Philadelphia Optifund Investment Program 403B ⇒ Vanguard Mid Cap Index Admiral Fund, 100% Interest DESCRIPTION: 403(b) 25.32% allocation		\$1,001 - \$15,000	Tax-Deferred		
School District of Philadelphia Optifund Investment Program 403B ⇒ Vanguard Target Retirement 2030 Fund, 100% Interest DESCRIPTION: 403(b) 14.82% allocation		\$1,001 - \$15,000	Tax-Deferred		

* Asset class details available at the bottom of this form.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Main Line Health System	Spouse Salary	\$23,823.00	\$88,146.00
The School District of Philadelphia	salary	\$22,234.00	\$89,373.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Great Lakes	June 2014	Parent Plus Student Loan	\$50,001 - \$100,000
DC	Great Lakes	June 2014	Student Loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Teacher and Coach	The School District of Philadelphia

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none">o Main Line Health Retirement Savings Plan (Owner: SP)o School District of Philadelphia Equivesto School District of Philadelphia Optifund Investment Program 403B
--

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Lawrence V. Arata , 04/8/2018